Intake	

1.	In order to locate or create a client record, users must complete a search.
	Search for a client*:*
	• Select the **Client** module and then **Client Search** from the navigation bar.
	• Enter your search criteria in at least one of the following fields:
	  o First or Last name
	  o Date of birth
	  o ID/ID Type
	• Click **[Search]**.
	Note: *The search results are listed below the search criteria. If the client exists, users can open the record and update data as needed. If no search results were returned you can add a client record.*

2.	**Add a client: Face Sheet** • Start at the **Client Search** page. • Enter both a First and Last name. • Click the add a client link. • Enter required information. • Click **[Save New Client]**. ***Note:*** *You are only required to complete fields marked with a red asterisk (*) and those fields noted on your form required by the program.*
3.	**Enter Personal Information: Address and Phone** • On the client's **Face Sheet** page, select **Personal Info** from the navigation bar. • Click the add a new Address link. • Enter required information. • Click **[Save New Address]**. • Select **Phones** from the navigation bar. • Click the add phone link. • Enter required information. • Click **[Save New Phone]**.
4.	**Enter Demographics:** • Select **Demographics** from the navigation bar. • Click the Add Cultural Background Information link. • Enter required information. • Click **[Save New Cultural Background]**.

5.	**Enter Employment:** • Select **Employment** from the navigation bar. • Click **[Add Employment Activity]**. • Enter required information. • Click **[Save New Employment]**. **Enter Household Characteristics:** • Select **Demographics** from the navigation bar. • Click **[Add Household Characteristics]**. • Enter required information. • Click **[Save New Household Characteristics]**.
6.	**Enter Insurance Information:** • Return to client's **Face Sheet Summary** page by clicking the Face Sheet link in the breadcrumbs. • Select **Insurance** from the navigation bar. • Click the add Insurance link. • Enter required information. • Click **[Save New Insurance]**.

Eligibility to Enrollment:	
1.	In order to ensure the client is eligible for this activity, users must complete an eligibility determination. **Determine Eligibility:** • Start at the client's **Face Sheet**. • Click **Single Activity Eligibility** from the navigation bar. • Select **Activity** from the drop down and click **[Select Activity]**. • Select **Contract** from the drop down and click **[Select Contract]**. • Select **Enrolling** Organization from the drop down and click **[Determine Eligibility]**. • Click **[Create Enrollment]**. ***Notes:*** • The system will display a message indicating eligibility status. For eligible clients, users proceed to create an enrollment. • If eligibility is denied, the system will generate an error message and indicate required action by user.
2.	Prior to completing enrollment, you will receive a message to complete the required enrollment assessment. **Complete an enrollment assessment:** • Click the complete enrollment assessment link from bottom right of page. At this time, do not enter date of enrollment. • Enter required information. • Click **[Next page]** to progress to the next section of the assessment. • Click **[Submit survey]** once completed with entering data.

3.	After submitting required assessment data, proceed with creating the enrollment. **Create Enrollment:** • Enter **Enrollment Period Start Date** (This date must be within the previous **365** days). • Click **[Calculate Timeframe]**. ***Note:*** There are program-specific time period rules associated with individual programs that range from seven days up to two years.
4.	**Confirm Enrollment:** • Click **[Confirm Enrollment]**. ***Note:*** • Without completing this step, enrollments will not be saved in the system. • While a client may have multiple enrollments for a program, only one can be **active** at a time.
5.	**Update Enrollment Start Date:** • On the **Update Enrollment page**, enter the new **Enrollment Start Date**. • Click **[Save Changes]**.

Encounters/Services: The service plan is automatically generated by the SDR.

Disenrollment: Disenrollment from a program is a two step process. You must close the enrollment and then complete a disenrollment assessment.

1.	**Close an enrollment:**
	• Start at the client's **Face Sheet.**
	• Select **Enrollments** from the navigation bar.
	• Click the active enrollment link.
	• Edit the necessary information.
	  o Mark enrollment status closed.
	  o Select the disenrollment reason.
	  o Edit the actual period end date.
	  o Enter comments (optional).
	Tip: The Enrollment End Date can only be edited if an enrollment is in "**closed**" status.
	• Click **[Save Changes]**.

2.	• Select **Disenrollment Assessment** from the navigation bar. • Enter required information. • Click **[Next Page]** to progress to the next section of the assessment. • Click **[Submit Survey]** once completed with entering data.

For system and access questions call:

Virtual Gateway Customer Service : 1-800-421-0938

For program policy or data forms questions call:

DPH Resource Center : 1-800-232-0093